Project Reporting Requirements

The Bureau has adopted a formal project management approach for all IT investments. The trained project managers understand that all projects are bound by the concept of scope, schedule, and budget, i.e., the project's triple constraints. The SCO can provide support to project managers who have not received the formal project management training.

In order to meet the project status reporting requirement the ITIB has requested, each project manager will report their project status against the project's originally ITIB approved scope, planned "base lined" schedule, and its initially requested budget as described in the project proposal, business case, or project plan. The SCO can help project managers assess the status of their projects and identify each project's approved scope, schedule, and budget.

The SCO has the responsibility for project oversight and tracking, which includes monitoring each project's triple constraints. The SCO will share collected information with the Investment Management Group (IMG), WO-550, so that the IMG can perform their responsibilities for monitoring each IT investment from an IT portfolio standpoint.

Project Scope
Project managers will review the baselined description of the scope of their project against the current project direction and report any variation from the approved baselined scope of the project. This includes variations such as a change in the functionality of the deliverable(s), a change in the delivery of a major milestone, or if the proposed design, development, testing, training, implementation or operations and maintenance strategy has changed from the approved project plan.

The SCO will analyze project scope status by comparing the ITIB approved baselined scope statement against any revision provided by the project manager. Significant variations will be reported to the ITIB. Project managers will be asked to provide supporting justification as to why the scope of the project has changed and what impact the scope change has had to the overall schedule, budget, and associated project risk(s).

The status of the project's scope will be reported as: within or outside of approved scope.

Project Schedule
All project managers will plan and organize their project tasks by creating a Work Breakdown Structure (WBS). All tasks/activities within the WBS will be organized by the General Accounting Office's (GAO) Information Technology Investment Management (ITIM) recommended phases of Select, Control, and Evaluate. At the next lower level within the WBS, all tasks/activities will be grouped by the stages identified within (Appendix A). Further breakdowns to the third, fourth, and fifth level of a WBS is at the discretion of the project manager. For additional guidance, refer to the SCO's suggested "Best Management Practices for Developing and Maintaining a Project Schedule."

All projects will assign planned start and end dates for each task included within the WBS. This schedule will become the "base-lined" by which all future project progress will be evaluated. Project schedules, once base-lined, can be only modified with project sponsor and ITIB approval. Project progress will be analyzed monthly by the SCO by comparing the actual task completion dates against the "base-lined" completion dates. The Office of Management and Budget has defined significant variation as ($\geq$ or $\leq$ 10 percent). The Department of the Interior has defined significant variation as ($\geq$ or $\leq$ 5 percent). Therefore, the SCO will work with each project manager to determine if, when and how any variation reporting will be reported to the ITIB. Project managers will be asked to provide supporting justification as to why the project has either fallen behind or is significantly ahead of schedule, and corrective actions they plan to take.

The status of the project's schedule will be reported to the ITIB as: on schedule, ahead of schedule or behind schedule.

Project Budget

All project managers will assign planned costs and monitor actual costs at the information technology investment stage level, as indicated in Attachment 2. It is, however, highly recommended that all costs be assigned to the lowest possible level within the WBS. Greater detail of estimated costs at the task/activity level is highly encouraged. However, if the project manager chooses to track project expenditures at this level, they must also be able to be "rolled-up" and reported at the project stage level as well. Planned costs include all government labor, travel, training, and equipment costs associated with all of the tasks/activities within each stage. It also includes any contractor labor, hardware, or software costs associated with the tasks/activities within each stage.

Project managers must baseline their planned costs, as approved by the ITIB, by stage and be able to report actual costs by stage on a monthly basis. These baselined costs must be consistent with the original amounts requested, approved, and/or subsequently modified by the ITIB. Project managers must ensure all project costs (labor, travel, training, equipment, and contracts) are entered into the Management Information System (MIS). Project numbers are assigned to each ITIB approved project. This will prevent the project manager from having to create "cuff-records" in order to track the overall cost of each project.

The SCO will analyze the project budget status by comparing the reported actual stage/task costs against the "base-lined" costs. The SCO will verify the reported actual costs within the MIS to ensure project cost reporting integrity. The Office of Management and Budget has defined significant variation as ($\geq$ or $\leq$ 10 percent). The Department of the Interior has defined significant variation as ($\geq$ or $\leq$ 5 percent). Therefore, the SCO will work with each project manager to determine if, when and how any variation reporting will be reported to the ITIB. Project managers will be asked to provide supporting justification as to why the project is either significantly over or under budget, and what corrective actions they plan to take.

The status of the project's budget will be reported to the ITIB as: within budget, under budget, or over budget.